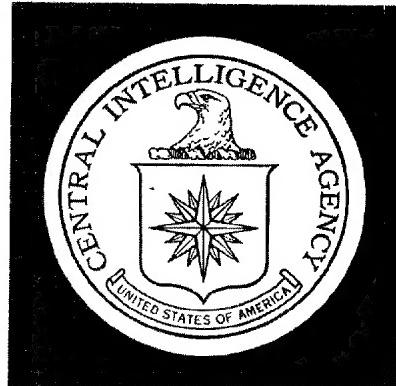


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DIRECTORATE OF
INTELLIGENCE

Intelligence Memorandum

Foreign Shipping to North Vietnam in January 1967

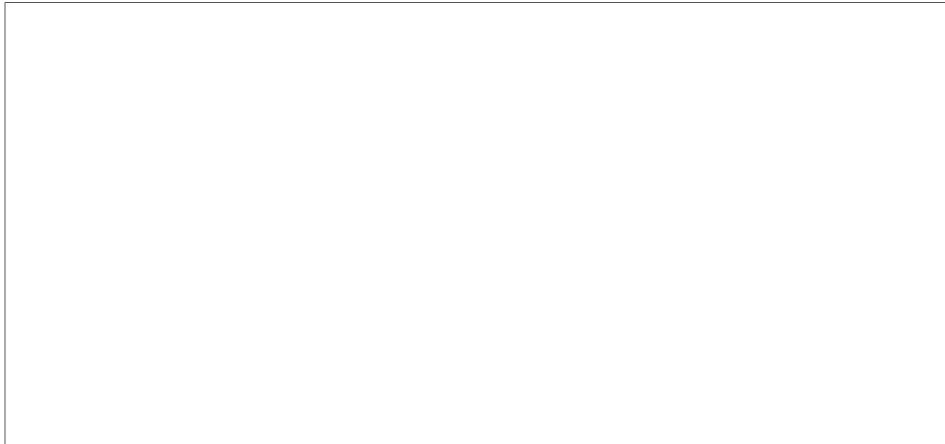
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FOREWORD

The data in this memorandum are preliminary and subject to modification as additional information becomes available. Significant changes may occur in data on ship arrivals and cargoes from Communist China and, to a lesser extent, in data on cargoes carried by ships of the Free World. Data on Soviet and Eastern European ship arrivals and cargoes and on Free World arrivals are not likely to be changed significantly. As required, changes will be reported in subsequent memoranda. All data on cargoes carried are expressed in metric tons.

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FOREIGN SHIPPING TO NORTH VIETNAM
DURING JANUARY 1967*

Summary

Seaborne deliveries of foodstuffs to North Vietnam increased sharply in January, apparently as a result of the relatively poor 1966 domestic rice crop. Seaborne imports of foodstuffs in the first quarter of 1967 will probably exceed the total for all of 1966. Imports of petroleum and exports of pig iron, coal, and miscellaneous general cargoes also were high in January. Total identified seaborne trade in January was about 10 percent above the average monthly volume in 1966. Both tankers and dry cargo ships calling at Haiphong were handled expeditiously.

Soviet ships made a record high number of calls, but arrivals of other Communist-flag ships and Free World ships approximated the average monthly level of 1966, as shown in the tabulation below:

Flag	Monthly Average		
	1966	December 1966	January 1967
Total	<u>31.6</u>	<u>38</u>	<u>37</u>
Communist countries	<u>25.4</u>	<u>34</u>	<u>31</u>
USSR	10.2	12	16
Eastern Europe	3.7	6	4
Communist China	11.5	16	11
Free World	<u>6.2</u>	<u>4</u>	<u>6</u>
United Kingdom	4.2	3	6
Other	2.0	1	0

* This memorandum was produced by CIA. It was prepared by the Office of Research and Reports, and information on ship arrivals was coordinated with the Office of Naval Intelligence; the estimates and conclusions represent the best judgment of the Directorate of Intelligence as of February 1967. For details on ship arrivals and the type and distribution of cargo, see Figure 1 and Tables 1 through 4.

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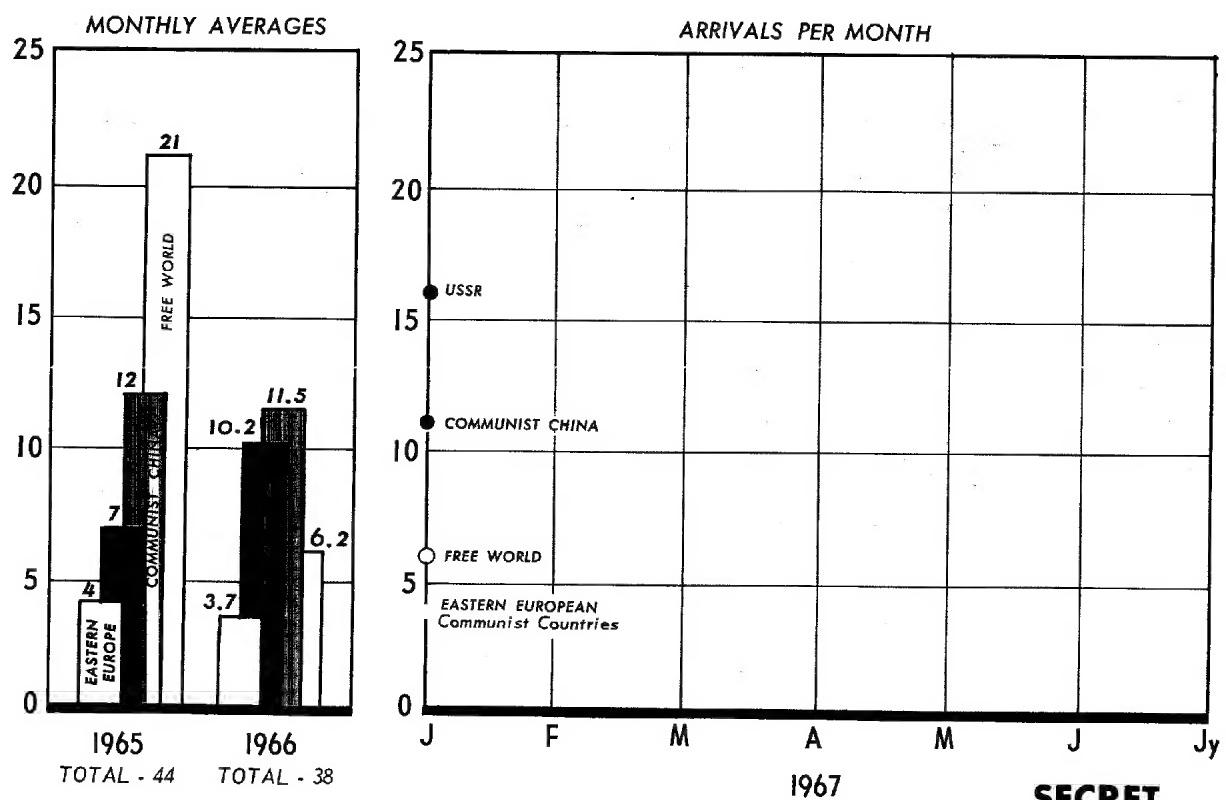
Imports of bulk foodstuffs -- sugar, rice, maize, and wheat flour -- totaled 23,800 tons in January, and will probably exceed 25,000 tons a month in February and March. This compares with a monthly average of about 4,000 to 5,000 tons during the first quarter of both 1965 and 1966. Petroleum imports totaling 21,300 tons included nearly 2,000 tons carried from Communist China by a British-flag dry cargo ship. An unidentified 8,000-ton cargo carried from Shanghai by a British-flag tanker may also have been petroleum; if so, petroleum imports would have totaled 29,300 tons, the highest since May 1966. No imports of arms or ammunition were detected.

Seaborne coal exports amounted to 77,300 tons, the highest volume since airstrikes crippled production at Cam Pha last April, but considerably below pre-strike levels. Continuing a trend apparent since September, exports of pig iron and miscellaneous and general cargoes remained high.

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Figure 1

North Vietnam: Foreign Ship Arrivals



I. Communist Shipping

A record high total of 16 Soviet ships called at North Vietnam in January. The exceptionally large number was due in part to the use of five small tankers to deliver a volume of petroleum that could easily have been accommodated by two of the larger Leningrad-class tankers* and to the arrival of an unusually large number (seven) of small Soviet dry cargo ships under charter to North Vietnam.** Of the 11 Soviet dry cargo ships that arrived in January, five were in ballast, three brought fertilizer and general cargo from Black Sea ports, two carried wheat flour from Vladivostok, and one delivered timber from Cambodia.

Four Soviet tankers arrived from Vladivostok, and a Baskunchak- class (1,770 GRT) tanker, Abakan (see Figure 2), arrived from the Black Sea. This ship, apparently newly built, is probably being transferred to North Vietnamese control. The Abakan, with its loaded draft of 15.25 feet, cannot negotiate inland waterways as far as Hanoi, but could be used to make deliveries to minor coastal ports.

Thirteen Soviet ships, including four tankers, departed from North Vietnam in January. Four of the dry cargo ships carried coal to Japan; one sailed with cement for Cambodia; three loaded general cargoes for Hong Kong, Singapore, and Black Sea ports; and one left in ballast.

Chinese Communist ships made 11 calls at North Vietnamese ports. Of 10 ships that arrived from China, 4 sailed directly to Cam Pha, presumably to load coal, and 6 went to Haiphong, apparently to offload. One Chinese ship arrived from Rumania with corn and vehicles.

Thirteen Chinese ships departed from North Vietnam in January. Eight carried coal to China; one carried cement and assorted general cargo to Hong Kong; and one sailed with mixed general cargo for Hong

* In common use prior to the destruction of petroleum discharge and storage facilities at Haiphong last summer.

** Throughout 1966, approximately five Soviet ships were under charter to North Vietnam at any given time: three under time charter and two on voyage charters. Currently, four Soviet vessels are operating under time charter to North Vietnam and a dozen more voyage charters are scheduled for February and early March.

Kong, China, and Eastern European ports. No cargo data are available for three Chinese ships that sailed from Haiphong for China.

Two Bulgarian and two Polish-flag ships accounted for the four calls by Eastern European ships. Both Bulgarian ships arrived in ballast. A Polish Ocean Lines cargo liner (see Figure 3) delivered general cargo, including trucks, from Poland, Czechoslovakia, and France, and a CHIPOLBROK*-chartered ship called while en route to Europe from North Korea, apparently to take on additional cargo.

Four Eastern European ships departed from North Vietnam. Two Bulgarian ships sailed with coal for Japan and France, and a third carried pig iron and general cargo for Hong Kong and Japan. A Polish cargo liner resumed its outward voyage with general cargo from North Vietnam for Hong Kong and Japan.

II. Free World Shipping

Six Free World ships, all British-flag ships chartered to Communist China, called at North Vietnam in January. These ships delivered about one-third of the import cargoes identified aboard foreign-flag vessels. Their cargoes included sugar from Cuba and coking coal, general cargo, and petroleum from Communist China.

Half of the calls were made by two dry cargo ships and a tanker owned by a Hong Kong company believed to be under Chinese Communist control. If, as suspected, the tanker carried petroleum, it was the first Free World tanker to do so since May 1965. A ship belonging to a company which recently transferred its headquarters from Hong Kong to Gibraltar delivered packaged POL. Another ship owned by this company also called at North Vietnam in January.

Three Free World ships departed from North Vietnam in January. All sailed in ballast for Chinese ports.

* The jointly owned Chinese-Polish Ship Brokers Company.

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FIGURE 2. THE SOVIET TANKER ABAKAN (1,770 GRT), WHICH ARRIVED AT HAIPHONG IN JANUARY, PROBABLY UNDER DELIVERY TO NORTH VIETNAM

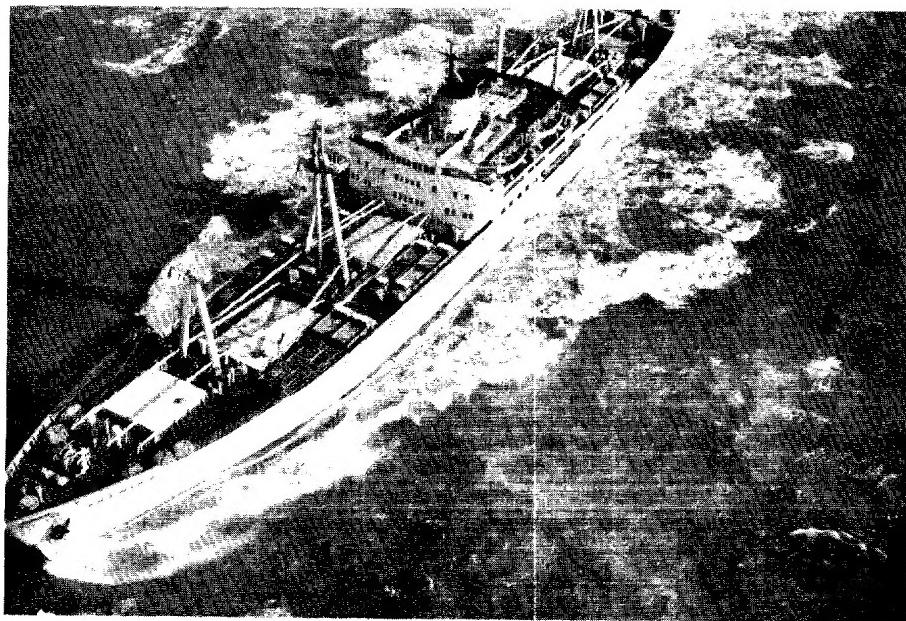


FIGURE 3. THE POLISH CARGO LINER PHENIAN EN ROUTE TO NORTH VIETNAM IN JANUARY WITH A DECK CARGO OF TRUCKS AND POL DRUMS

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III. Cargoes

Foreign ships carried 187,300 tons of identified cargo in and out of North Vietnamese ports in January, compared with a monthly average of 171,000 tons in 1966. Haiphong handled about 83,000 tons of identified dry cargo, somewhat above the 1966 average. Dry cargo ships departing Haiphong in January had been in port an average of 12 days, about normal for that port.

Identified seaborne imports totaled 85,100 tons in January, nearly 10 percent more than the average monthly volume in 1966. Imports of food and POL were exceptionally heavy, whereas imports of fertilizers and miscellaneous and general cargoes were relatively light. No shipments of arms or ammunition were detected.

Petroleum imports totaled 21,300 tons* in January. Five tankers and a dry cargo ship delivered nearly 19,400 tons of POL from Soviet ports, and a Free World ship delivered nearly 2,000 tons from Communist China. All tankers apparently discharged into barges at the Song Bach Dang anchorage (see Figure 4).

An unseasonable increase in imports of bulk foodstuffs in January may have been a result of North Vietnam's relatively poor 1966 rice crop. Although seaborne imports of bulk foodstuffs usually drop off sharply following peak deliveries in the last quarter of each year, the volume imported in January and scheduled for delivery in February and March is extraordinarily large, as shown in the following tabulation:

* This total does not include an estimated 8,000-ton shipment delivered by a British-flag tanker which may have been petroleum.

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	<u>Thousand Metric Tons</u>		
	<u>1965</u>	<u>1966</u>	<u>1967</u>
January	5.0	2.7	23.8
February	0.8	1.0	29.0 ^{a/}
March	10.2	6.8	26.0 ^{a/}
Average Monthly Volumes			
October-December	18.1	12.6	
January-December	9.9	6.4	

a. Estimated minimum volumes based on preliminary loading data.

Seaborne imports of foods in January consisted largely of Cuban sugar, Soviet wheat flour, Rumanian corn, and Chinese rice.

Imports of fertilizers and of miscellaneous and general cargoes, the two major seaborne imports in 1966, were at low levels in January, as shown below:

	<u>Thousand Metric Tons</u>	
	<u>January 1967</u>	<u>Monthly Average, 1966</u>
Fertilizers	10.6	18.7
Miscellaneous and General Cargoes	26.8	34.7

General cargo shipments from Eastern European countries were particularly light. General cargo deliveries from the USSR included barges, trucks, tractors, bulldozers, generators, and rolled steel; 3,000 tons of coking coal arrived from Communist China.

Identified North Vietnamese exports on foreign ships in January amounted to 102,200 tons, compared with an average of 93,300 tons a month in 1966. Coal exports, which amounted to 77,300 tons, reached the highest level since last April. Shipments from Cam Pha rose to the highest monthly total -- 62,500 tons -- since the coal washing and grading facilities there were damaged by airstrikes in April 1966. The January figure for Cam Pha was, however, nearly 47 percent below the monthly average for the first quarter of 1966.

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NORTH VIETNAM: Maritime Ports, Anchorages, and Shipping Channels

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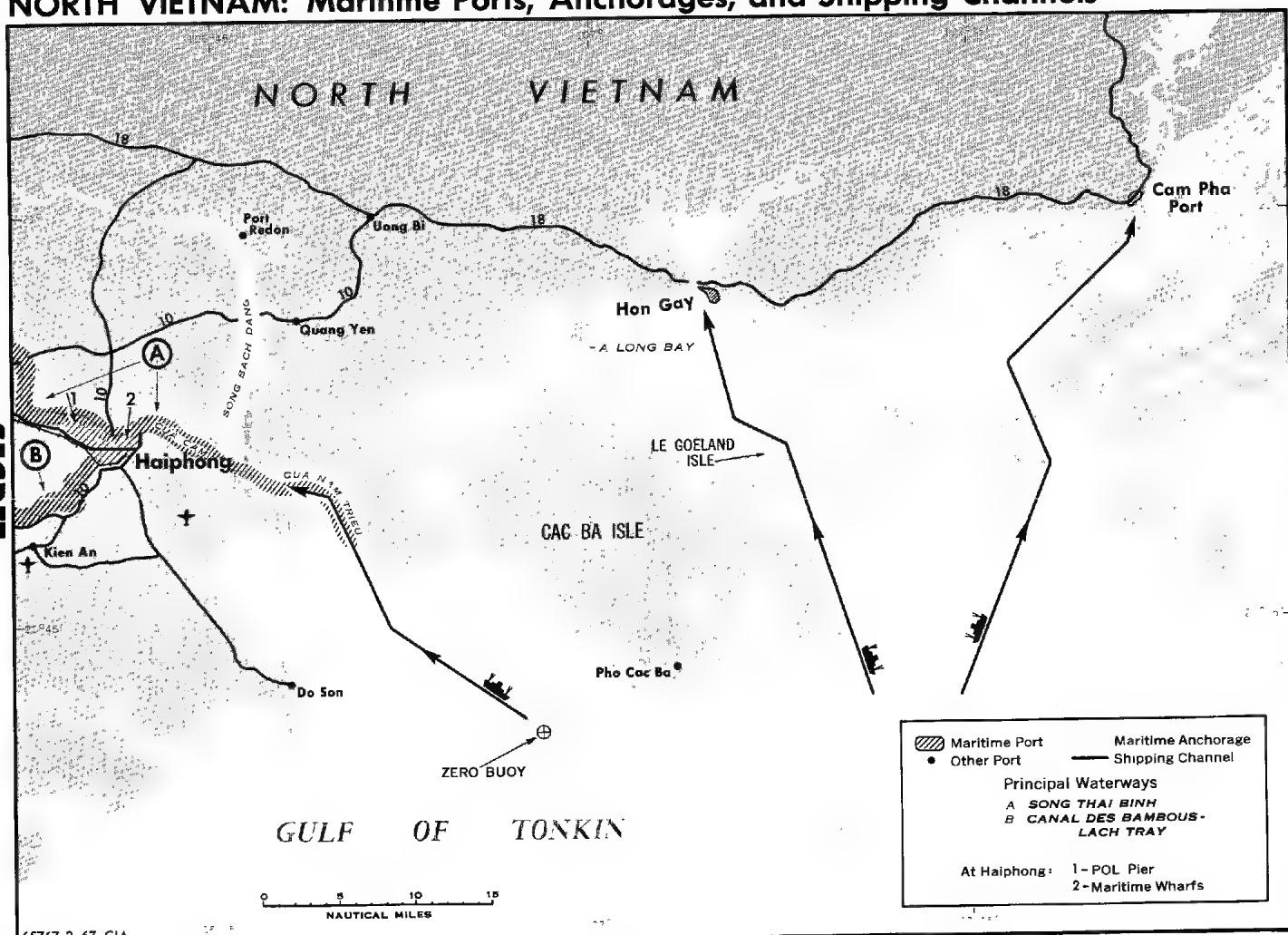


Figure 4

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A Soviet ship transported North Vietnamese anthracite to Haiphong in January for the fifth time in as many months. It was also reported that coal for export was loaded in the Haiphong area. If so, it would confirm photographic analysis of late 1966, which suggested that the coal mines at Vang Danh, being renovated and expanded as a Soviet aid project, were operational. Anthracite from these mines would move by rail to Port Redon (see Figure 4) and thence by barge to Haiphong. The mine complex is large, indicating a potential for producing substantial quantities for export.

Seaborne exports of cement totaled 5,500 tons in January, compared with a monthly average of 7,600 tons in 1966. Continuing a trend apparent since last September, seaborne exports of pig iron and of miscellaneous and general cargoes* were relatively heavy, as shown in the tabulation below:

	Thous and Metric Tons						
	1966						
	Monthly Average						
	1965	Jan-Aug	Sep	Oct	Nov	Dec	Jan 1967
Pig iron	4.0	0.4	7.0	8.3	14.7	7.0	7.6
Miscellaneous and General Cargoes	10.0	3.9	7.0	7.3	12.4	13.7	11.8

A strong Japanese market has stimulated pig iron exports, but the reason for the upturn in miscellaneous cargo shipments is not known.

* North Vietnam's exports of miscellaneous and general cargoes consist largely of fruits, coffee, preserves, sodium silicate, and many handicraft items.

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Table 1

North Vietnam: Foreign-Flag Ship Arrivals a/
December 1966, January 1967, and Monthly Average, 1966

<u>Flag</u>	<u>January 1967</u>		<u>December 1966</u>		<u>Monthly Average 1966</u>	
	<u>Number</u>	<u>Percent</u>	<u>Number</u>	<u>Percent</u>	<u>Number</u>	<u>Percent</u>
Total	<u>37</u>	<u>100.0</u>	<u>38</u>	<u>100.0</u>	<u>31.6</u>	<u>100.0</u>
Communist countries	<u>31</u>	<u>83.8</u>	<u>34</u>	<u>89.5</u>	<u>25.4</u>	<u>80.4</u>
USSR	16	43.2	12	31.6	10.2	32.3
Eastern Europe	4	10.8	6	15.8	3.7	11.7
Albania					0.2	0.6
Bulgaria	2	5.4	2	5.3	0.7	2.2
Poland	2	5.4	4	10.5	2.7	8.5
Communist China	11	29.7	16	42.1	11.5	36.4
Cuba					0.1	0.3
Free World	<u>6</u>	<u>16.2</u>	<u>4</u>	<u>10.5</u>	<u>6.2</u>	<u>19.6</u>
Cyprus			1	2.6	1.0	3.2
Greece					0.6	1.9
Italy					0.1	0.3
Malta					0.3	0.9
United Kingdom	6	16.2	3	7.9	4.2	13.3

a. Because of rounding, components may not add to the totals shown.

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Table 2

North Vietnam: Tonnage of Foreign-Flag Ship Arrivals a/
December 1966, January 1967, and Monthly Average, 1966

Flag	January 1967		December 1966		Monthly Average 1966	
	Number	Gross Register Tons	Number	Gross Register Tons	Number	Gross Register Tons
Total	<u>37</u>	<u>179.8</u>	<u>38</u>	<u>211.4</u>	<u>32</u>	<u>178.5</u>
Communist countries	<u>31</u>	<u>145.6</u>	<u>34</u>	<u>182.4</u>	<u>25</u>	<u>142.4</u>
USSR	16	74.0	12	71.7	10	71.0
Eastern Europe	4	27.4	6	42.4	4	27.1
Communist China	11	44.2	16	68.3	12	43.5
Cuba					Negl.	0.8
Free World	<u>6</u>	<u>34.2</u>	<u>4</u>	<u>29.0</u>	<u>6</u>	<u>36.1</u>

a. The aggregate tonnage of ships calling is not necessarily correlative to the actual volume of cargoes moving into and out of North Vietnam, but these data are of value as indications of relative changes in the volume of shipping. Because of rounding, components may not add to the totals shown.

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Table 3

North Vietnam: Identified Imports Carried by Foreign-Flag Ships a/
January 1967

Flag	Commodity						Total
	Ammonium Sulfate and Other Fertilizers	Petroleum	Bulk Foodstuffs	Timber	Miscel- laneous		
Total	<u>10.6</u>	<u>21.3</u>	<u>23.8</u>	<u>2.6</u>	<u>26.8</u>	<u>85.1</u>	
Communist countries	<u>10.6</u>	<u>19.4</u>	<u>13.7</u>	<u>2.6</u>	<u>10.8</u>	<u>57.0</u>	
USSR	10.6	19.4	5.9	2.6	9.5	47.9	
Eastern Europe			Negl.		1.1	1.1	
Communist China b/			7.8		0.2	8.1	
Free World	0	<u>2.0</u>	<u>10.1</u>	0	<u>16.0 c/</u>	<u>28.0</u>	

a. Because of rounding, components may not add to the totals shown.

b. An additional unknown quantity of imports may have been carried by Chinese Communist ships.

c. Includes an estimated 8,000 tons on the British tanker Taipieng, which arrived from Shanghai with unknown cargo.

Table 4

North Vietnam: Identified Exports Carried by Foreign-Flag Ships a/
January 1967

Flag	Commodity					Total
	Coal	Cement	Pig Iron	Miscel-	laneous	
Total	<u>77.3</u>	<u>5.5</u>	<u>7.6</u>	<u>11.8</u>	<u>102.2</u>	
Communist countries	<u>77.3</u>	<u>5.5</u>	<u>7.6</u>	<u>11.8</u>	<u>102.2</u>	
USSR	20.1	4.6	0.4	2.5	27.5	
Eastern Europe	17.2		7.2	2.8	27.2	
Communist China a/	39.9	0.9		6.6	47.5	
Free World	0	0	0	0	0	

a. Because of rounding, components may not add to the totals shown.

b. An additional unknown quantity of exports may have been carried by Chinese Communist ships.

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